



<account name> Deal Review
Using the MEDDPICC approach

Sales Rep:

SC:

Review Date:

URL to this opportunity in
Salesforce:

Metrics & ROI – don't exit "Stage 3 – Discover" until ROI has been presented

1. Have you presented the ROI?	
2. What related metrics and success stories have we shared to support the campaign? Will our champion use these metrics?	
3. What metrics are most important to the economic buyer?	
4. What outcomes are you looking to drive with your events?	
5. How are you measuring success?	

Economic Buyer

1. Who is the economic buyer and how do we know they are the economic buyer?	
2. What are economic buyer's issues and buying criteria? (they can be different than the business users)	
3. Have we met with the economic buyer AND shared the ROI with them? Do they agree?	

4. Is there a budget allocated for the project and are they willing to spend it? Where is the budget coming from?	
Decision Criteria	
1. What does the prospect think the criteria is and why?	
2. How is the criteria weighted?	
3. Who wrote the criteria and is it reflective of the business initiatives and problems at hand?	
3. Can we write or influence the criteria? If no, why not and who did? A competitor?	
4. Is the criteria consistent with the economic buyer's issues?	
5. Has the criteria been documented and confirmed by the decision makers and by the Clearbit SA?	
6. Why do they want to change from their current system and processes?	
7. Which Clearbit products and modules are relevant? Which ones do we need to demo?	
8. Who will sign off on moving forward at each stage?	
Decision Process	
1. What is the decision-making process and who are the required signatures we need?	
2. What committees and individuals need to evaluate and recommend our solution?	
3. Can anyone block the order? Have we met with them? Why would they block the deal?	
4. Do we know the org chart and who needs to sign which documents throughout the process?	

5. Is there a partner involved in the process? If so, are they involved, can they block the order, and are they friendly to Clearbit?	
Paper Process	
1. What is the procurement process (who will be involved and when), including legal sign off?	
2. Based on previous purchasing history, what was the process?	
3. How long does the internal sign-off take?	
4. Who and when will the purchase requisition and justification for the purchase? If there is a PO, who writes it, who signs it and how long does it take?	
Identify the pain	
1. What are their main pain points?	
2. How do these impact the business?	
3. What is the financial impact of these pain points?	
4. Who feels the pain the most? Why?	
5. Will the economic buyer spend the money if we can solve these pain points?	
Champion – <i>don't exit "Stage 2 – Develop" until your champion has been identified</i>	
Who are Clearbit's champions in the account?	
1. Why are they our champions? How will you develop and test them?	
2. Are they actively working to move the project forward? How?	
3. Do they know they are your champion?	
4. Why do they want Clearbit? Will they fight for us?	

5. Who are our competitor's champions? Have we met with those individuals?	
6. How will our champion help against our competitor's champions?	
7. If there is a partner involved, are they our champion?	
Compelling Event – <i>don't exit "Stage 2 – Develop" until a compelling event has been identified</i>	
What are the compelling events?	
1. Is there a time frame associated with the compelling events?	
2. When would you like to go-live? Why? What happens if we miss this target?	
3. What is your budget cycle? When is your fiscal year?	
4. When does your incumbent provider's contract expire?	